Movement of Case File Process

When you receive a paper file request you need to check care first to find out where the file is stored.

You can find this information by going into the individual’s record on care first, click on the person details box *(top right hand corner)* then stroll down to file details to see where the file is stored.

If the file is located at the records centre please follow process below

1. Record the details on the “Movement of case file tracker spread sheet” that is stored on one drive *(if you require access to this please ask a UC/Senior Admin or Team Manager to share this with you)*

Click on the appropriate tab where the worker is based and complete the relevant boxes (instructions on what is required in the boxes is in red below)

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Date Requested | CF Number | Purpose | Date Received | Timescale | Worker | Date Returned | Date Received in Records | Notes |
| Input the date you are requesting the file | Input clients Care First number | Input a brief note stating why the worker requires the file i.e. viability assessment | Input the date you receive the file from the records centre / Heaton Centre | Input the length of time the worker requires the file – It may be useful to put a reminder in your outlook diary to remind you to check the spreadsheet and chase up files that are to be returned. | In put the name of the person requesting the file | Input the date you have returned the file to the records centre / Heaton Centre | Once the records centre receive the file they will inform you by email – you will then in put that date  For Heaton Files input the date the UC takes the file back to the Heaton Centre | Input any relevant notes |

To request the file you complete the attached form and email it to [records.centre@newcastle.gov.uk](mailto:records.centre@newcastle.gov.uk)



The records centre will then notify you via email when they have located the files and how many they are sending across to you.

Once received input that date into the “date received” box on the spreadsheet

Just be aware that sometimes the record centre send a large amount of files out for some clients but the worker only requires specific files or those within a certain timeframe. If this is the case, those that aren’t required could be returned to the Records centre & the spreadsheet updated in the notes column to confirm what’s been returned/kept. Also, if a file is scanned onto Total View a note can be made & the attached Scanning Form can be completed & sent to Records Centre. If all the file has been scanned you can dispose of the paper file in the confidential waste.



When you return the file’s to the records centre you need to complete the attached form, place a copy in the front of the, upload the form to Total View and complete the relevant boxes on the spread sheet and move the file to the closed tab on the spread sheet.



Updated / Checked by Gemma Gill July 2018